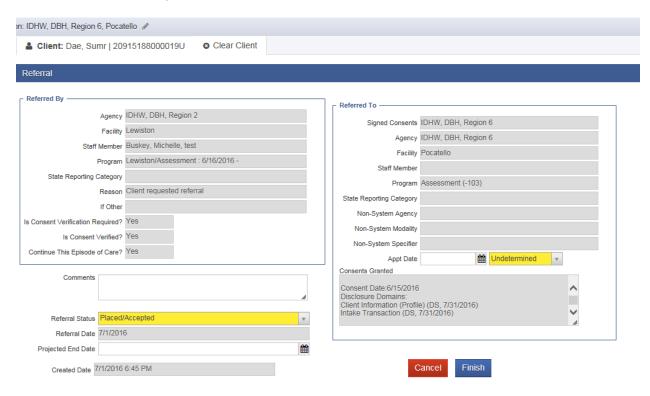
Unable to accept a Referral for a Transferred Client

Issue:

Review a Referral in a status of Created/Pending for a client with Transfer this client is marked as "Yes". Change the status to Placed Accepted and click "Finish".



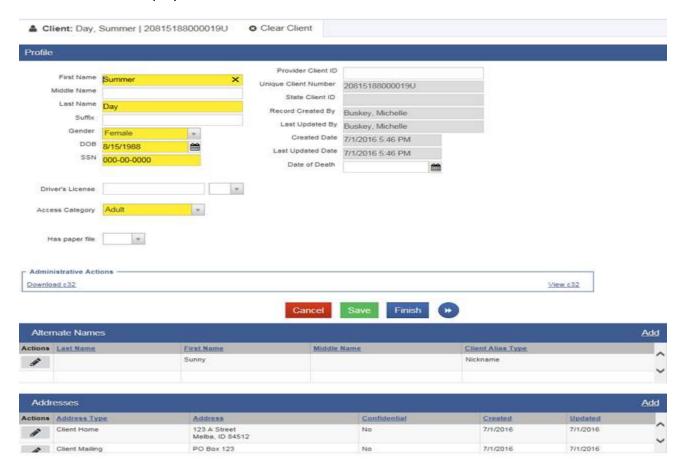
A list of similar clients displays. Click "Select" to indicate the correct client or click "Yes" to create a new client.

Similar Clients already exist in the System and are listed below. Do you wish to continue inserting this client record? Click "Yes" to continue to Add the record or "No" to Cancel the creation of the new record. The Select Action will take you to the record of the duplicate client.

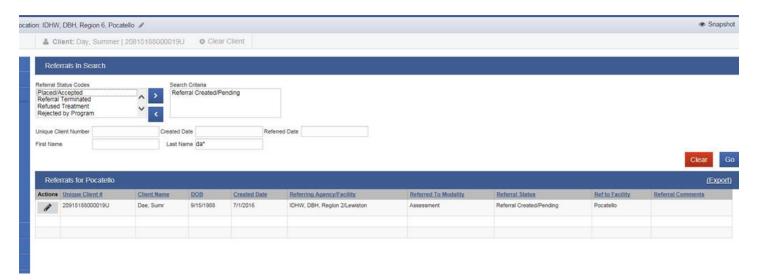




The Client Profile displays. Click "Save".



The transfer function should have created an Intake and other activities for the client. However, a new Intake is <u>not</u> created. If you review the Referral it will continue to show a status of Created/Pending if you chose the "Select" action. If you chose to create a new client by clicking "Yes", then the Referral has a status of Placed/Accepted.



Workaround:

When you encounter this error, Please send an email with a screen shot of the "Referral" to the WITS HelpDesk at: DBHWITSHD@dhw.idaho.gov. The WITS team will submit the information to FEI who will complete a data Fix.